



Job Loss Analysis

ID No: 2000018 Status: Closed

Original Date: 01/Jul/2009
Last Review Date: 8/Aug/2012

Organization:

SBU: Global Manufacturing
BU: Global Mfg - shared
Work Type: Technical (Process Engineering)
Title (Work Activity): Ordering Services or Materials
Site/Region:

Personal Protective Equipment (PPE)	Selected	Comments
Additional Task Specific PPE		
Other		

Reviewers

Reviewers Name	Position	Date Approved
Michelle Johansen	Process Engineering Manager RI	12/31/09

Development Team

Development Team Member Name	Primary Contact	Position
Moore, Bradley (BMJW)	Y	Lead Process Engineer
Wyatt, Sharon (WYAT)		Process Engineer
Stephen Dole (SDKG)		Process Engineer

Job Steps

No	Job Steps	Potential Hazard	Critical Actions
1	Contact procurement to discuss service or material need.	<ol style="list-style-type: none"> 1. Service or material needed may be involved with a purchasing contract for a particular vendor that must be honored. 2. Service or material may need to be bid through Procurement protocol. 3. Particular vendors may have contractual issues with working in or with the refinery. 4. Surplus catalyst can accumulate in storage. 	<ol style="list-style-type: none"> 1. Discuss the service or material you need with Procurement to determine if there are any existing contracts in place that required purchase of material or service from a particular vendor. 2. Discuss the service or material you need with procurement to determine if a bid needs to be issued. 3. Discuss with the appropriate zone buyer if a contract exists or if there will be any potential contract issues with the needed good or service. <ol style="list-style-type: none"> 3a. If necessary complete a Contract Request Form and Jobsite Safety Addendum from the Procurement Intranet site. 4. Contact designated Chevron representative who maintains the catalyst inventory sheet. <ol style="list-style-type: none"> 4a. If a suitable catalyst is in inventory, request to have the desired amount and type reserved for the next reactor load. 4b. Once catalyst is removed from inventory and loaded in a reactor, ensure that the catalyst inventory sheet is updated.
2	Contact the vendor to discuss the requested good or service.	<ol style="list-style-type: none"> 1. Unauthorized employee could commit Chevron to pay for goods or services. 	<ol style="list-style-type: none"> 1. If pricing or contract terms are discussed with the vendor, make sure to specify that only "budgetary estimates" are discussed and not exact quotes. Quotes should be only be discussed between the vendor and the procurement group. <ol style="list-style-type: none"> 1a. Never sign any paperwork from a vendor and never agree, verbally or otherwise, that a service or material will be purchased.

3	Create a Material Request for a requested material	<ol style="list-style-type: none"> 1. Material requested must go through Passport/Maximo and cannot be process by Procurement from an e-mail. 2. Person requesting good or service may not have enough DOA to approve expenditure. 3. Material request may not have enough information to be able to issue a Purchase Order. 4. Material or service being purchased may not get accounted for properly or may not get charged to the proper plant charge code or project code. Catalyst purchased >\$50,000 should not be charged to a plant cost center. 5. Available warehouse space may not be sufficient for material quantity. Special handling considerations, such as transporting and storing catalyst in a covered container to keep dry may get overlooked. 6. Often material is ordered many months in advance of delivery date and potential exists for many of the details specified in the material request preparation to get overlooked or missed upon delivery. 	<ol style="list-style-type: none"> 1. Send e-mail to Process Engineering designated Material Request generator to have your material need entered into Passport/Maximo as a MR. 2. Before material request is submitted, sufficient expenditure approval must be obtained. Process engineers have \$50,000 expenditure authority. <ol style="list-style-type: none"> 2a. If purchase is <\$50,000 inform affected cost center of anticipated charge so that budgets can be checked and adjusted if necessary. 2b. If purchase is >\$50,000 request approval for the purchase from employee with sufficient DOA. 2c. Refer to RI-900 Financial Authorities Guide for more guidance on obtaining expenditure authority or discuss with the zone buyer to determine required approval level. 2d. Send email approval to the designated material request generator so that the proof can be attached to the Material Request. 3. Specify the following for the material request: <ol style="list-style-type: none"> 3a. Name of material and supplier. 3b. Quantity needed 3c. Price estimate 3d. Need date 3e. Charge code or project code 3f. Delivery Location (i.e. plant number, warehouse) 3g. What buyer the material request should be routed to. Specify the appropriate zone buyer. 4. For catalyst purchases >\$50,000, contact Finance to create a Project Number for the catalyst. Provide the reactor number, cost of catalyst, and expected run life in # of months. Include the cost for any support material if possible. <ol style="list-style-type: none"> 4a. The cost of the catalyst will be depreciated monthly over the life, so it is important to keep Finance up-to-date if the loading date changes or if the anticipated run life changes. 4b. Enter the project number as the charge code that the material will be charged to. 4c. Other goods or services can be charged to the affect plant number charge code. 5. Ensure warehouse and procurement are aware in advance of storage and special handling needs. <ol style="list-style-type: none"> 5a. Provide the Warehouse with information on delivery container (drums, totes, supersacks, etc), quantity, special handling requirements, anticipated delivery date, and number of months anticipated for storage. Obtain from the warehouse a delivery location to be included in the Material Request. 5b. Discuss special handling requirements with zone buyer so that specifications can be detailed in the Purchase Order and associated paperwork. 6. Make sure to record the Material Request number and the Purchase Order number in a safe location and GDW for future reference. Email the Purchase Order number to the warehouse so that your special requirements and/or storage needs will be associated with the correct material.
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4	Schedule service dates with vendor.	<ol style="list-style-type: none"> 1. Vendor may not be granted entry to the refinery due to lack of training, proof of training, or proof of valid contract. 2. Vendor may not be familiar with how to access refinery and plant. 3. Company Reps office may not be expecting the vendor and may not have a representative available to assign to the vendor. 4. Operations may not be aware this service has been scheduled and may not be prepared. 5. Auxiliary materials such as maintenance, scaffolding, electrical or utility connections may not be available if not scheduled in advance. 6. New materials being brought into the refinery may not have appropriate safety, health, and environmental documentation. 	<ol style="list-style-type: none"> 1. Ensure that vendor is aware of and is prepared for all of the requirements for entry to the refinery. 2. Discuss appropriate vendor access point. Be specific on which gate to enter. 3. Enter names of contractor personnel into the Visitor Notification System. <ol style="list-style-type: none"> 3a. Ensure that "Visitor Hours" are marked "CRep" for a day shift service or "Extended" for day/night shift service. 3b. Notify operations in the affected plant(s) of the details of the service you have arranged. 4. If the service will require significant operator attention, discuss in detail with area STL to determine if overtime operator needs to be scheduled to support. 5. Discuss any auxiliary needs with the affected operating area and maintenance representative so that personnel and material can be appropriately planned. <ol style="list-style-type: none"> 5a. If necessary, have the vendor come on site in advance of the service date to specify auxiliary needs (i.e. have vendor meet with scaffolders to make sure appropriate time and manpower are scheduled). 6. Prior to scheduling delivery, complete an MOC and any other refinery requirement for new chemicals or catalysts being brought into the refinery. Contact HES department to understand what documentation is necessary. <ol style="list-style-type: none"> 6a. Obtain MSDS from the vendor to attach to HES forms. 6a. HES documentation must also be completed if the maximum inventory or container of a material is being changed.
5	Complete documentation.	<ol style="list-style-type: none"> 1. Next engineer may not have good records of what was planned and ordered. 2. Process engineers are not authorized to approve charges or sign timesheets. 3. Payment may be delayed if charges are not approved. 4. If catalyst load sheets are not provided to Finance, catalyst will not be charged optimally or accounted for by Environmental. 	<ol style="list-style-type: none"> 1. Document the details of the material or service in a common location and on GDW. <ol style="list-style-type: none"> 1a. If a MOC was generated, follow up on any action items and inform PSM when change is complete so the MOC can be closed in a timely manner. 2. Do not sign any paperwork from a vendor without the explicit approval of Procurement. 3. Accounting will seek verification from request originator once vendor sends invoice for services or goods. <ol style="list-style-type: none"> 3a. Check invoice charges against quoted or estimated charges and work with Procurement and Accounting if questions or discrepancies are identified. 3b. Sign and return paperwork to Accounts Payable group once charges have been validated. 4. If material purchased was a catalyst, email a catalyst load sheet to Finance and save to GDW. <ol style="list-style-type: none"> 4a. Catalyst load sheet should contain the reactor name, catalyst type, anticipated run length in # of months, amount of catalyst that was dumped, and details of metals reclamation if applicable. 4b. Alert finance if anticipated catalyst run length changes during the run so the monthly depreciation can be adjusted accordingly.

Revision Log

Date	Site/Reviser	LPO#/Action Item#	Comments
8/6/12	Richmond/J. Young	147974 / 128810	Step 4, Critical Action 6 revised in order to replace references Pascagoula specific Refinery Instructions